

## Cataloguing Templates

This lesson demonstrates creating, using, exporting and importing item record templates for cataloguing. Use of templates enhances item creation and helps ensure consistency in record format in the database.

### Creating Item Templates

1. Retrieve a record in the catalogue as described in **Searching the Database for Cataloguers.**
2. Select *Actions for this Record > Holdings Maintenance.*
3. Select an item record in list and click *Actions for Selected Rows > Edit Item Attributes.*
4. The Copy Editor opens. Select required template attributes by moving through fields and clicking *Apply* for every edit, and click *Save*.

**Copies**

**Record Summary**

Title: Salmon : the decline of the British Columbia fishes  
Author: Meggs, Geoff  
TCN: (System) [DYNIX\\_39381](#)  
Edition: Last Edited By: (SITKA) [101010101010101](#)  
Pub Date: c1991  
Last Edited On: 01/22/08

**Copy Editor**

Templates: Book Apply Delete Import Export **Save** Reset

**Identification**

Barcode: 11111 1 copy  
Creation Date: 1 copy  
Creator: 1 copy  
Last Edit Date: 1 copy  
Last Editor: 1 copy

**Location (1)**

Shelving Location: Stacks 1 copy  
Circulation Library: BPR 1 copy  
Owning Lib : Call Number: BPR : 338.3/72755 1 copy  
Copy Number: 1 1 copy

**Circulation (2)**

Circulate?: Yes 1 copy  
Holdable?: Yes 1 copy  
Age Protection: <Unset> 1 copy  
Loan Duration: Normal 1 copy  
Fine Level: Normal 1 copy  
Circulate as Type: [ ]

**Miscellaneous (3)**

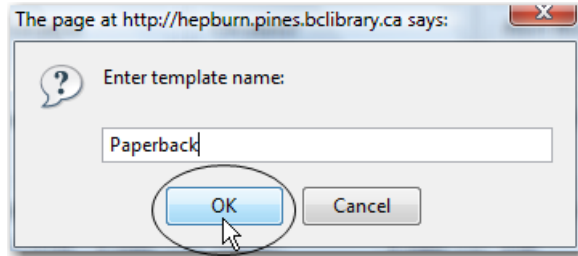
Alert Message: <Unset> 1 copy  
Deposit?: No 1 copy  
Deposit Amount: 0.00 1 copy  
Price: 5.00 1 copy  
OPAC Visible?: Yes 1 copy  
Reference?: [ ]

**Statistics (4)**

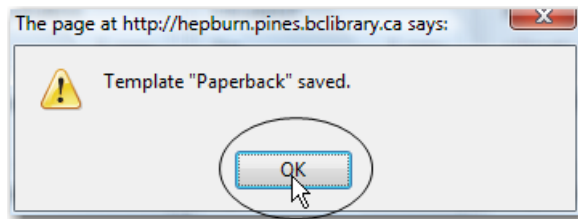
Library Filter

Create Copies (M) Close

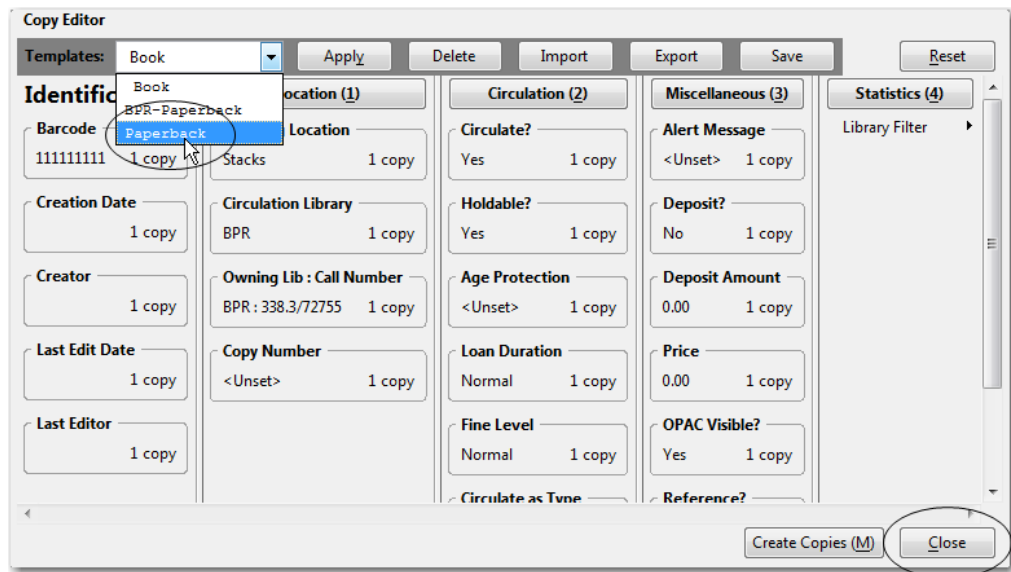
5. Enter a template name at prompt and click *OK*.



6. Template is saved. Click *OK*.



7. You can now choose your new template from drop down menu, or click *Close* to exit the Copy Editor.



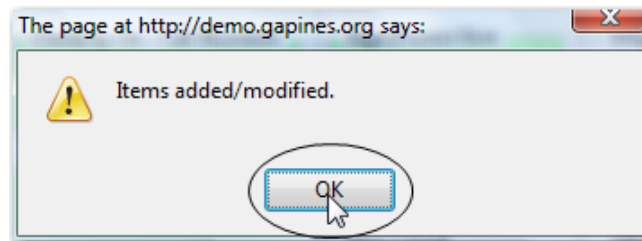
## Using Item Templates

You can now use the templates when you manually add items to the database.

1. Navigate to appropriate volume record in cataloguing and select *Actions for this Row > Add Items*.
2. Enter number of copies and barcode and click *Edit then Create* to open Copy Editor.
3. Choose the appropriate template from the drop down menu and click *Apply*.

The screenshot shows the 'Copies' window with the 'Record Summary' for a book. The 'Copy Editor' section is open, and the 'Templates' dropdown menu is showing 'Book', 'BPR-Paperback', and 'Paperback'. The 'Paperback' option is selected. The 'Copy Editor' section has tabs for 'Identific', 'Location (1)', 'Circulation (2)', 'Miscellaneous (3)', and 'Statistics (4)'. The 'Identific' tab is active, showing fields for 'Barcode', 'Creation Date', 'Creator', 'Last Edit Date', 'Last Editor', 'Circulation Library', 'Owning Lib: Call Number', 'Copy Number', 'Circulate?', 'Holdable?', 'Age Protection', 'Loan Duration', 'Fine Level', 'Circulate as Type', 'Alert Message', 'Deposit?', 'Deposit Amount', 'Price', 'OPAC Visible?', and 'Reference?'. Each field has a '1 copy' indicator. At the bottom right, there are buttons for 'Create Copies (M)' and 'Close'.

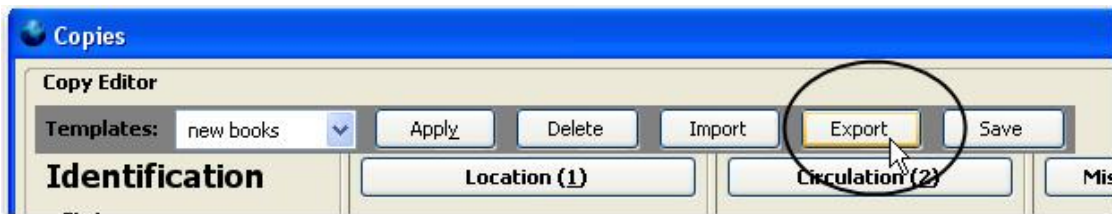
4. Make any necessary edits, remembering to click *Apply* for each edit, and click *Create Copies (M)*.
5. Item is created. Click *OK*.



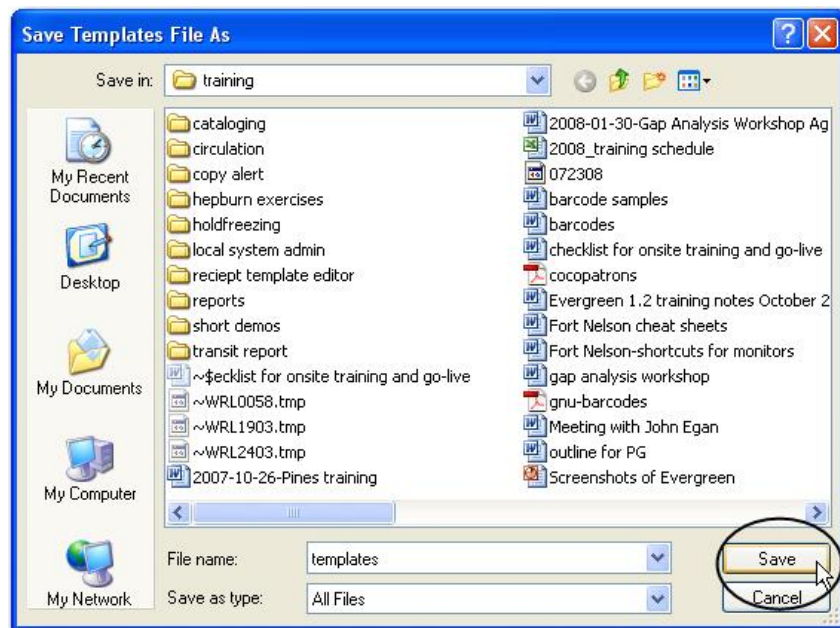
## Exporting Item Templates

Templates are saved and viewable by the login that created them. To share templates with other staff, you will need to export them.

1. In the top left hand corner of the Copy Editor, click on *Export*. This will export all of your templates.



2. Select where you will save the template on your computer, name the file and click *Save*. You could email the file from your computer, or save it to a flashdrive to move it to a different computer.

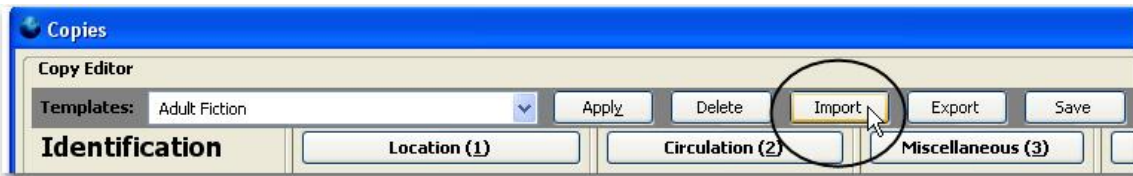


3. Click *OK*.

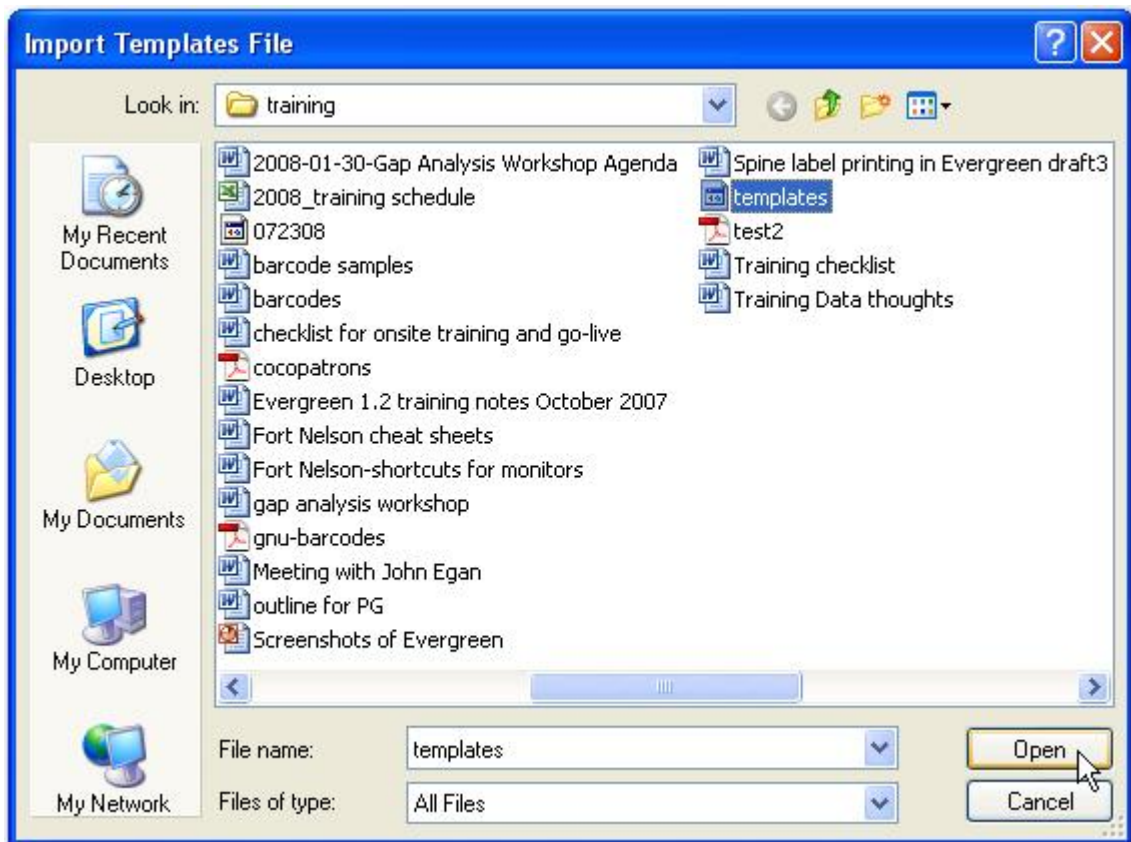


## Importing Templates

1. In the top left hand corner of the Copy Editor, click on *Import*.



2. Navigate to where the file is located, select the file and click *Open*.



3. Click *OK*.

